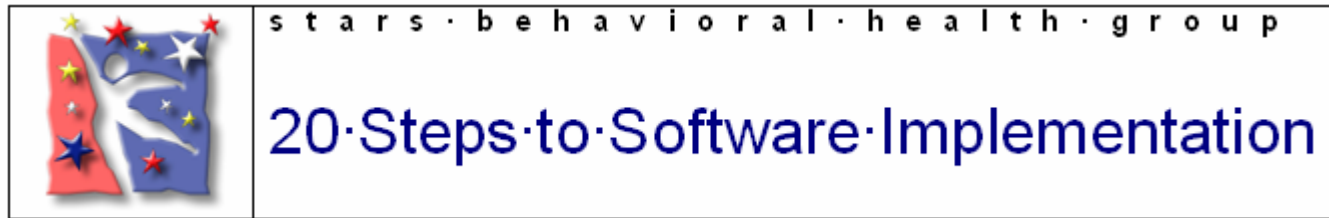


# 20 Steps to Software Implementation

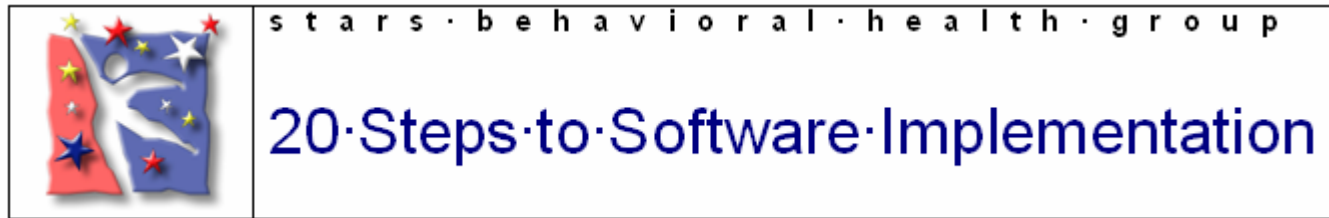


**STARS BEHAVIORAL  
HEALTH GROUP**

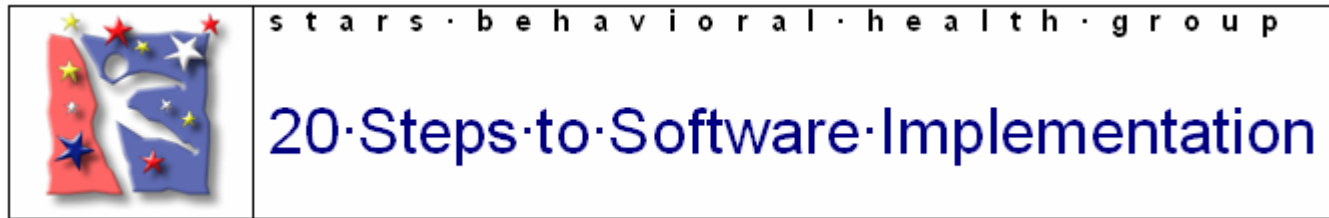
David White  
IT Director



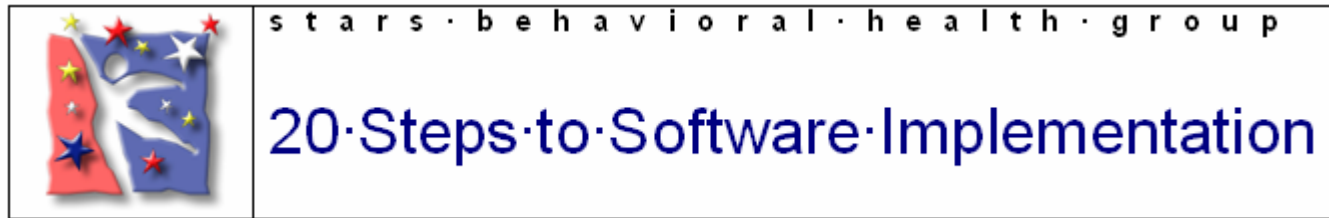
- 1. Needs Assessment
  - Determine exactly what your requirements are
  - Examine if this is an opportunity to go beyond barest needs



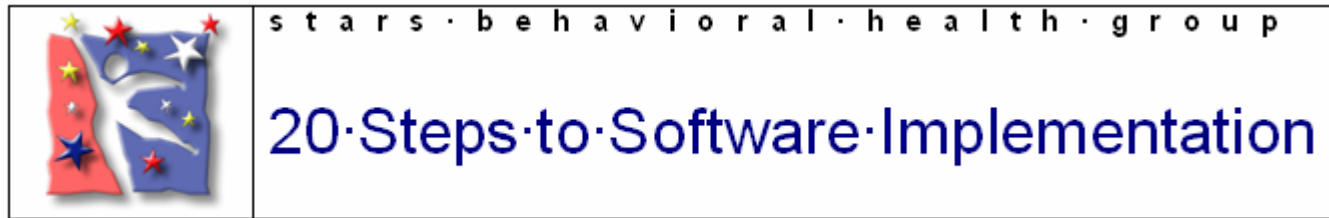
- 2. Inventory assets and resources
  - What computer equipment do you have?
  - What is your data communication status?
  - What is the technical competency of your staff?
  - Do you have IT staff / technical resources?



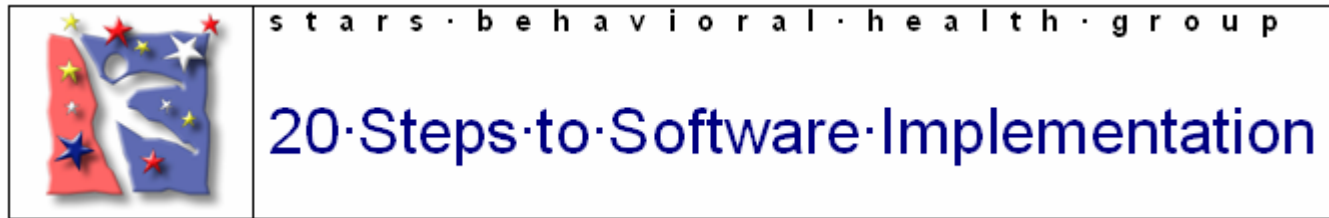
- 3. Budget
  - How much can you realistically spend on this?
  - Do not forget that there will be many costs other than the software. These include:
    - Computers & internet connection
    - IT Staff / consultant time
    - Lost productivity and learning curve time
    - Time required for double-entry during transition
    - Annual software maintenance cost



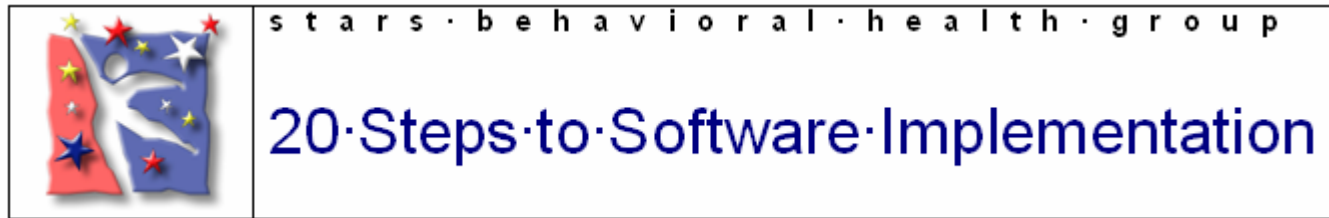
- 4. Form Committee
  - Make sure to include executive sponsorship
  - Make sure to include line staff.
  - Try to include a range of roles and responsibilities
  - Identify a key driver for this project. This will probably be your project manager



- 5. RFP - Most wanted list
  - Create a document that clearly defines what your needs are
  - Create a second list of what you would like to see “in a perfect world”
  - Either circulate to vendors and request their response or keep it internal and use it to evaluate vendors

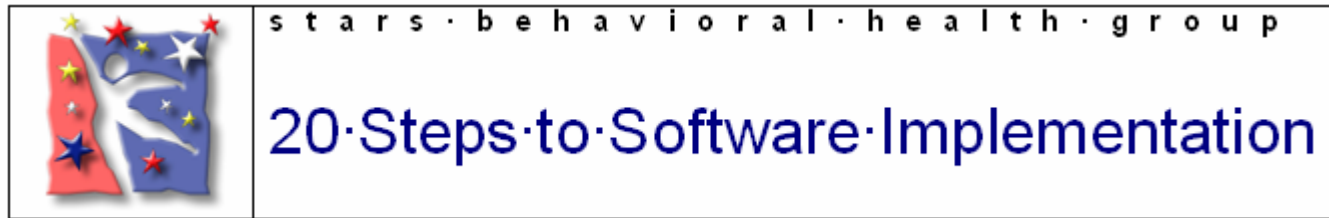


- 6. Committee Selects Solution
  - Based on the RFP, the budget, and the feelings of the committee & executives, select a solution
  - If there is no solution available that suits your needs, re-evaluate your needs
  - If there is not solution available that suits your budget, re-evaluate your budget
  - Try to stay focused on your core needs and not the bells and whistles
  - Look for solutions that can be implemented in stages or phases

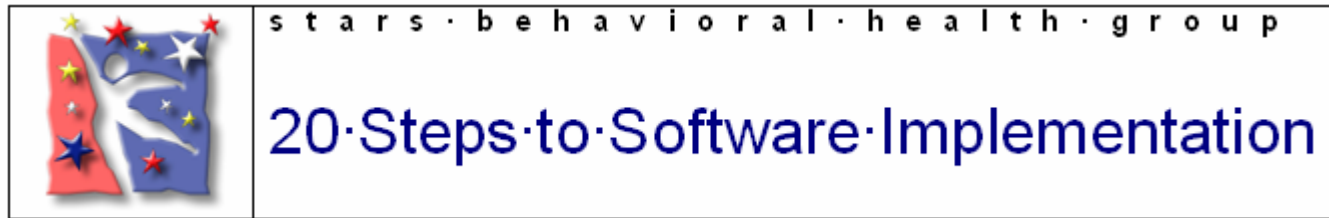


- 7. Compare Solution requirements with inventory & correct short comings
  - Upgrade computers and internet connection, if necessary
  - Retain IT support staff or contractor(s)

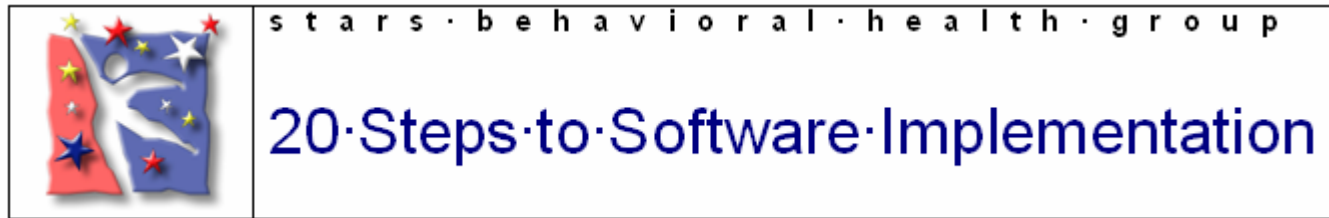




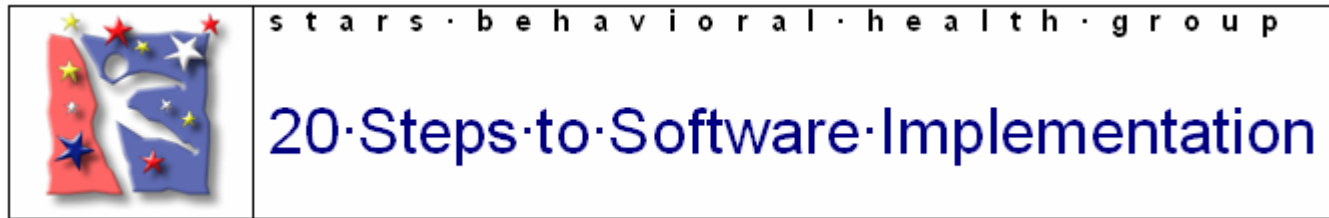
- 8. Map out with vendor an implementation strategy
  - They should have a plan for doing this
  - Let them guide, not drive. This is your implementation and your business
  - Try to lock in schedules, especially for the vendor to be on-site for things like training
  - Make sure your project manager knows who they will be working with from the vendor



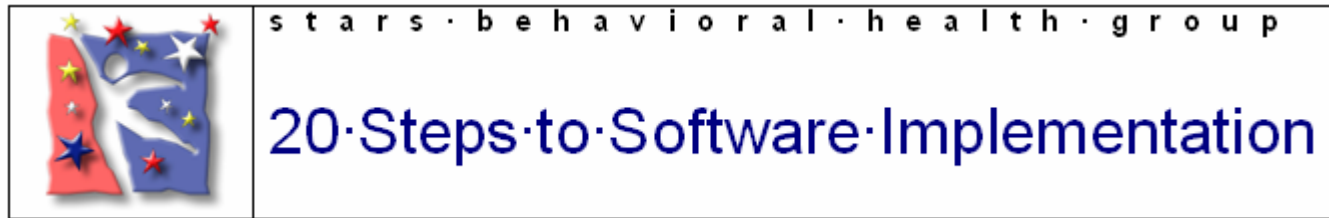
- 9. Review with Committee all current processes that are relevant.
  - This can be done sooner, but seldom is
  - This is a massive undertaking. Do not treat this lightly
  - If this is not done properly, you will have huge problems later
  - Make sure you have a project manager take the lead on this



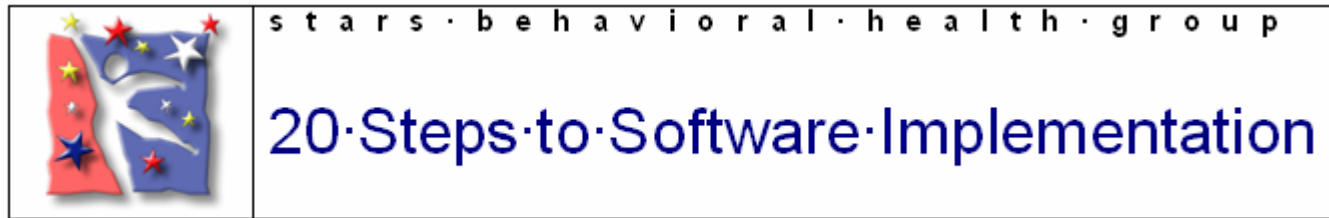
- 10. Map current processes to new software solution with vendor.
  - Focus on the 80 / 20 rule. What will accommodate 80% of your situations?
  - Can you change your process?
  - Can you afford to change your software?



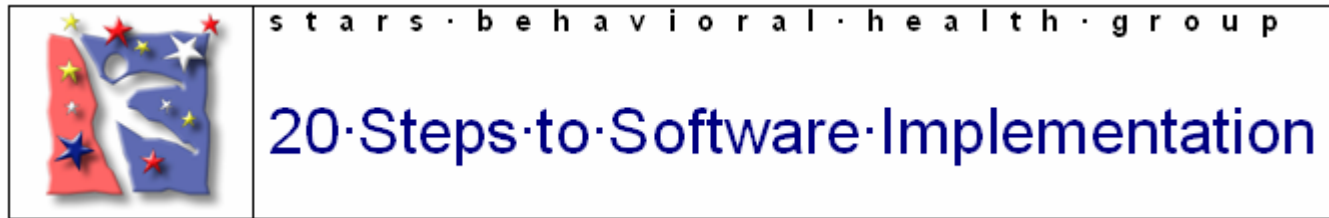
- 11. For the 20% that do not fit, decide to change the software or the process
  - Do not worship your forms. If you can capture the necessary data, let the form go
  - Do not allow a few exceptions derail the entire process. Even if you have a handful of situations accommodated outside of your system, do not let that stop moving forward



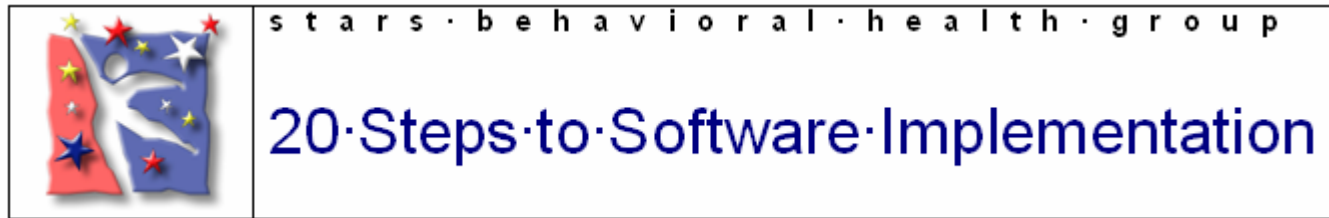
- 12. Consider a phased approach to customization (Need, want, desire)
  - Start with what you absolutely must have
  - Then look to what would be the most benefit (usually to the bottom line)
  - Only then look for nice-to-have's



- 13. Install / configure new software solution
  - This will take some combination of the vendor, your IT resources and other staff
  - If at all possible try to get 3 installations of the system:
    - A “live” version
    - A test version. A duplicate of the live but where updates that can be tested.
    - A training version. A duplicate of the live but where staff can make mistakes without endangering anything.
  - Think about how you will manage change control when your vendor comes out with an update

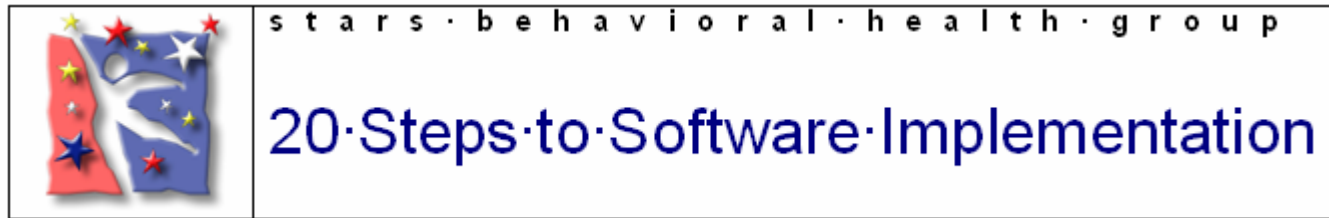


- 14. Enter data into new system
  - Create your process for getting information in to the new system
  - This may include data imports, data entry or a combination of the two

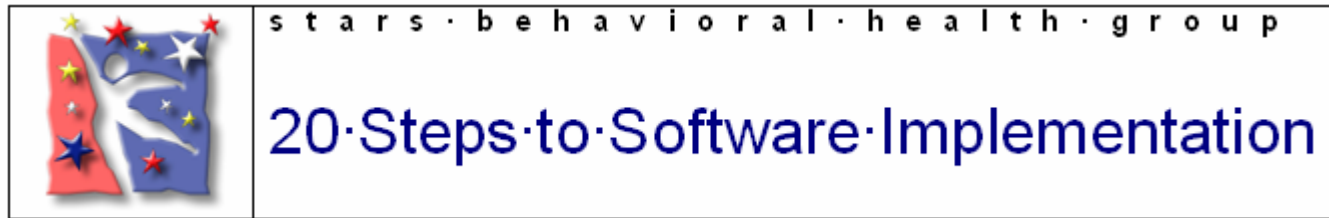


- 15. Test processes in conjunction with system. Get line staff involved
  - Let your staff start to work with the new system.
  - Get all levels of staff involved
  - This is where you will see whether or not you did a good job of documenting your processes
  - Be prepared to go back to step 11 and make some changes either to the system or to your processes

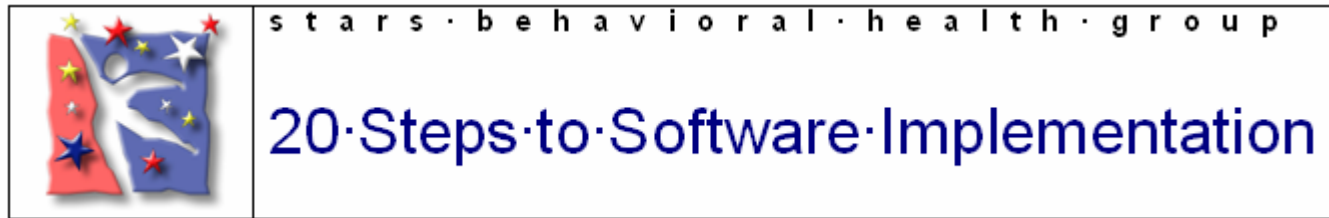




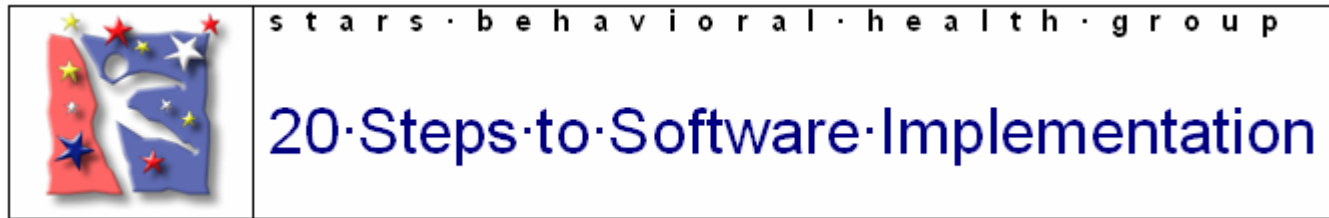
- 16. Prepare go-live strategy. Include roll-back strategy
  - Never do anything that cannot be undone if you have the choice
  - This may mean a period of working in both systems
  - Keep paper copies of things for a while. That way things can always be recreated



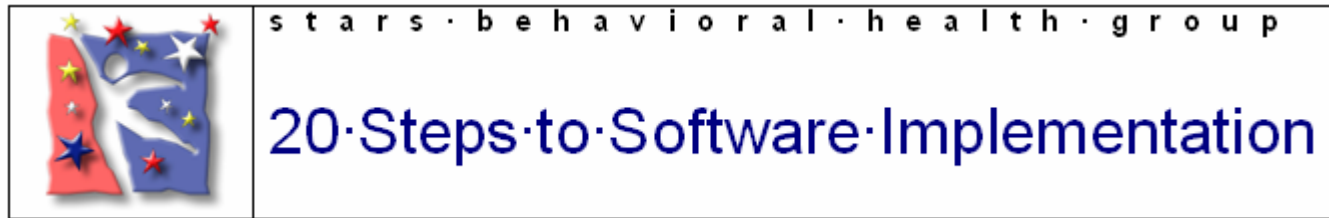
- 17. Schedule training.
  - Make sure you have the right people in the right training
  - Your vendor should be leading at least some of the training
  - Perhaps consider a “power-user” approach where some staff get a lot more training and become the “go-to” people for your staff



- 18. Confirm that screens, forms, and reports are all sufficient
  - As people go through training and begin to work in the system, make sure everyone can get the information in and out of the system that they need to do their job
  - Do a pulse check of comfort levels
  - Do not worship your forms. If you can capture the necessary data, let the form go



- 19. Go live!
  - Plan out how you want to go live
    - All at once or a little at a time?
    - By module or workgroup, or facility?
  - Make sure you know how you can go back if you must
    - Set down your criteria for failure (We will stay live unless a, b, or c happens)
    - If you have to roll back, this is not the end. You regroup, update and try again.



- 20. Address issues - technical / training / change process
  - There will be things that come up. Plan for it
  - Start to look at your next Phase, whether this is the next facility, module, or your nice-to-haves

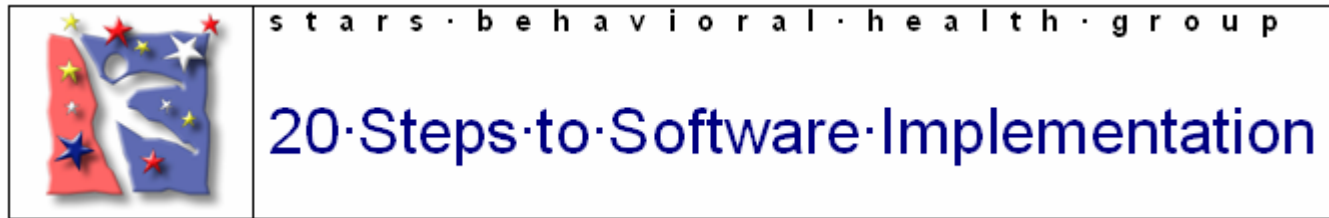


s t a r s · b e h a v i o r a l · h e a l t h · g r o u p

## 20·Steps·to·Software·Implementation

- Celebrate!





- Talking to prospective vendors
  - Let them know that you expect their software to remain compliant with all federal, state, county and local requirements and they will be contractually obliged to do so
  - Get software escrow for the vendor's source code
  - Determine how you can access your data
  - Make sure you understand their service level agreements for support
  - Ask them to commit to a number of hours for customization, report writing and training
  - Look at their included reports. See if you need custom reports
  - Talk to their referrals. Ask detailed questions
  - Evaluate how easily clinical staff will understand their software